Deputy Chief of Naval Operations Fleet Readiness & Logistics

Logistics M&S --Integral to GCSS & FAM Rationalization Process

Logistics Planning & Innovation Division

Navy GCSS

Enterprise Resource Planning

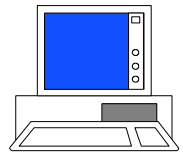
Authoritative Data Sources — **Sample Programs and Systems**

Shipboard Posture		Navy Combat Support System (NCSS)
Munitions		Ordnance Information System (OIS)
Supply		One-Touch Support
Maintenance		Distant Support
Acquisition		Navy M&S and Automated Identification Technology (AIT) Programs
Weapon System Autonomic Support		Navy Joint Strike Fighter (JSF)
Personnel		Navy Standard Integrated Personnel System (NSIPS)
Medical		Theater Medical Interoperability Program Maritime (TMIP-M)
Transportation Engineering		Navy TC-AIMS

Global Information Grid (GIG)

FORCEnet (NMCI IT-21 BLII)

Interoperable In… for the User



Web Access Brower

Navy's Portal
- Any User
- Any Box
- Anywhere

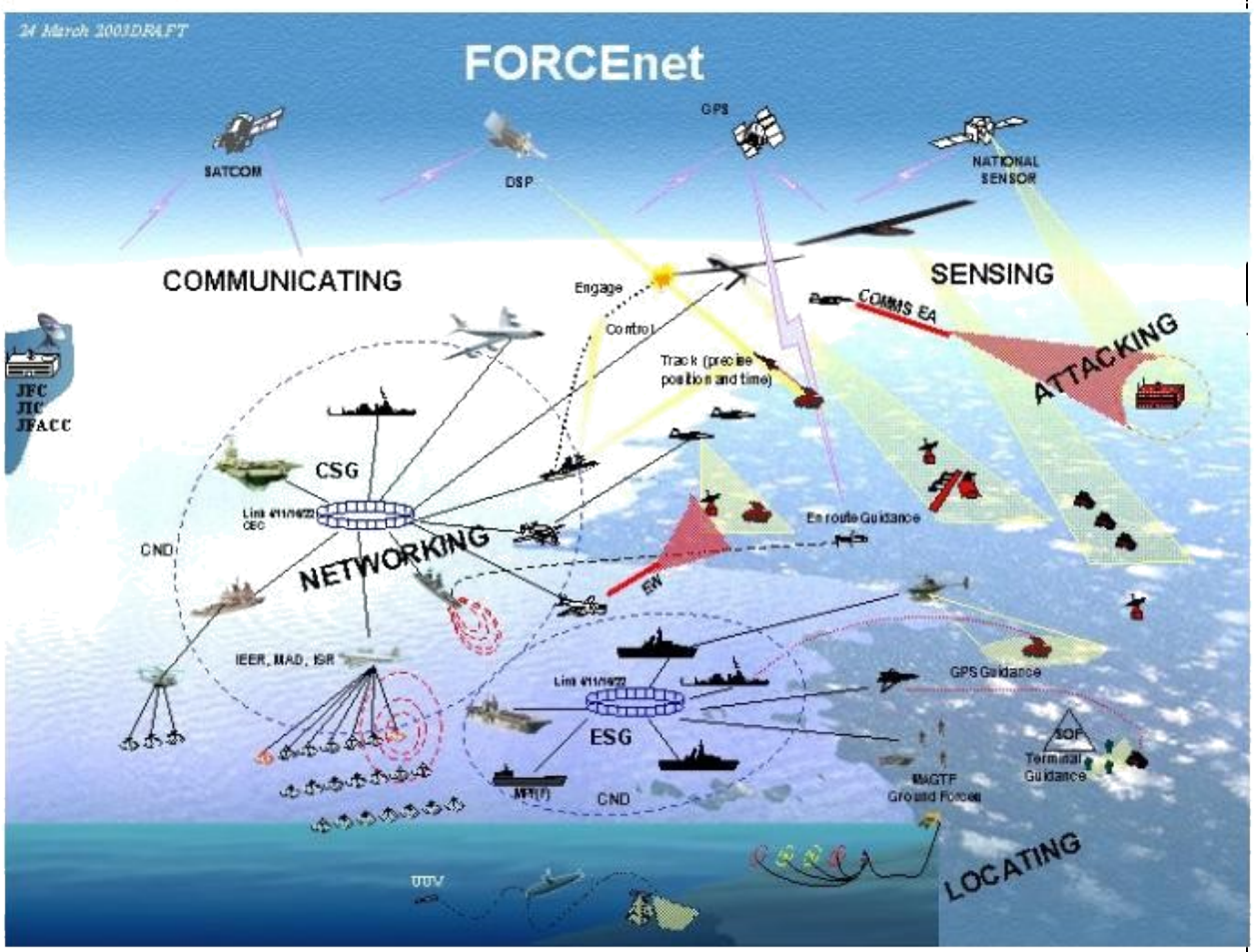
Task Force Web

CNO's Philosophy

"I want everyone here in industry to remember that Vern Clark said here today that we are never ever building another capability that doesn't fit into a FORCENet architecture for the future that ensures everybody is netted and connected. That is the future."

CNO
Sea Air Space Exposition
Washington, D.C.
April 17, 2003

FORCEnet Operational View



- Sea Power 21 – “Naval”
- Joint from Inception
- Commercial Standards
- Spiral Development with Sea Trial
- Warrior Focused

Tying it together

Current Readiness

Future Readiness

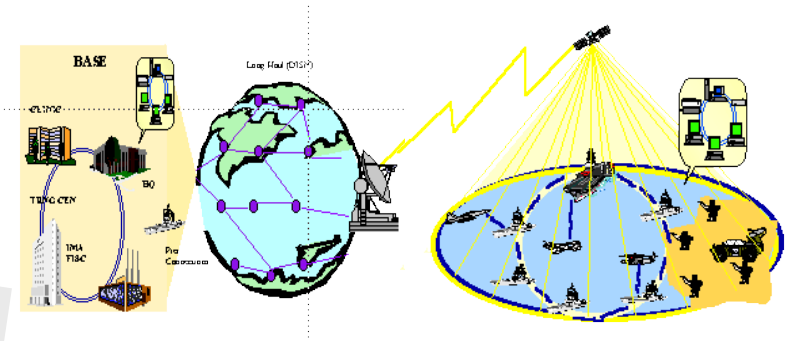
INFRASTRUCTURE

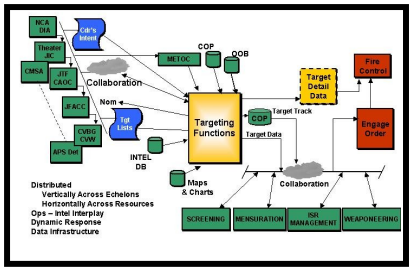
DECISION MAKING

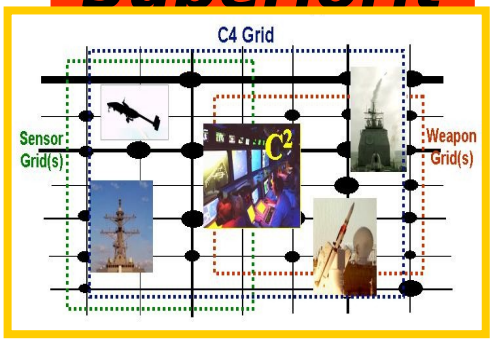
HORIZONTAL INTEGRATION

NMCI + **IT-21** + **Information Fusion** = **FORCEnet**

Superiority

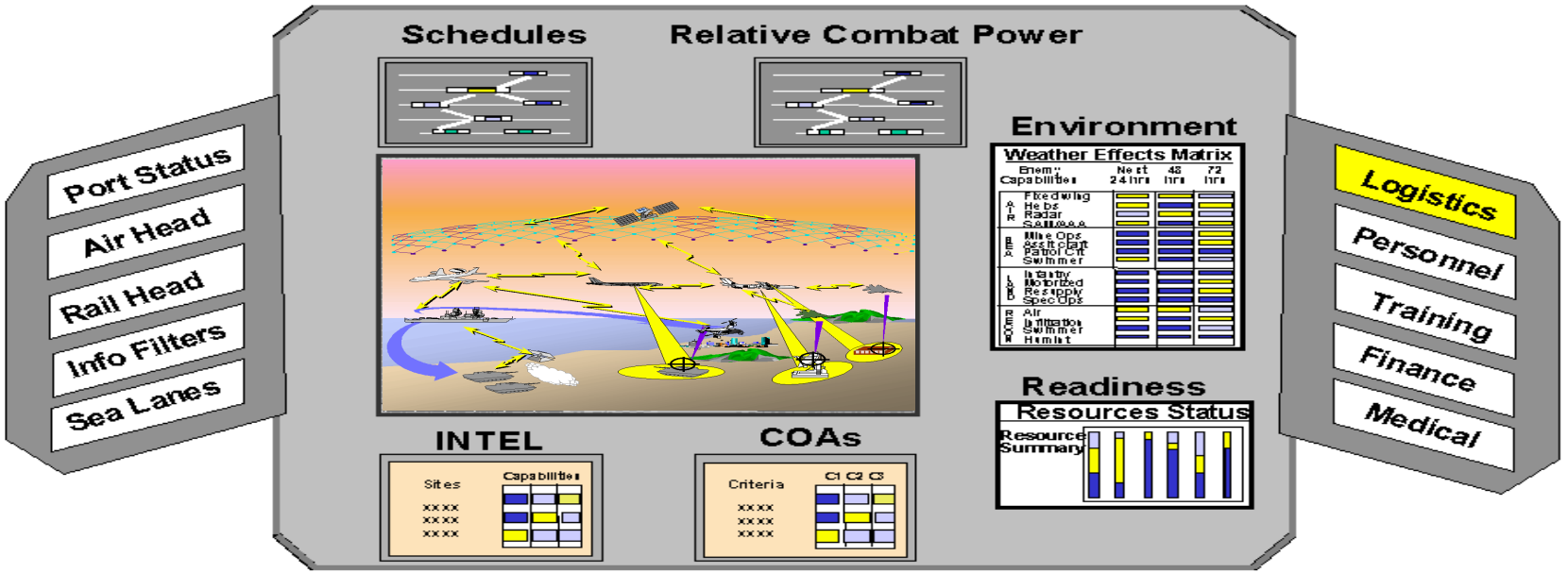






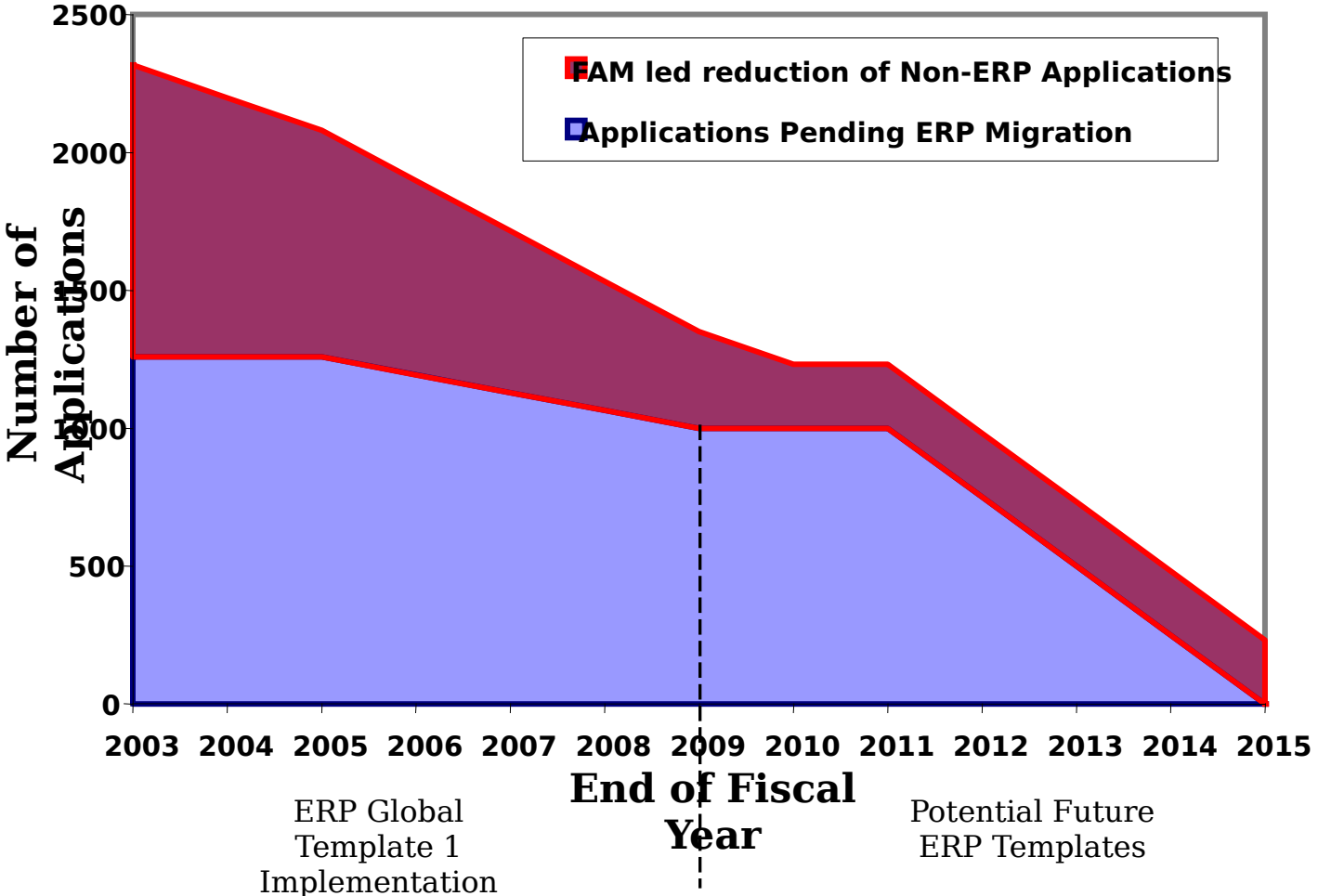
Navy GCSS Summary

Our Objective: Total support to the wa



Projected Application Reduction

Projected Logistics and Readiness Application Reduction

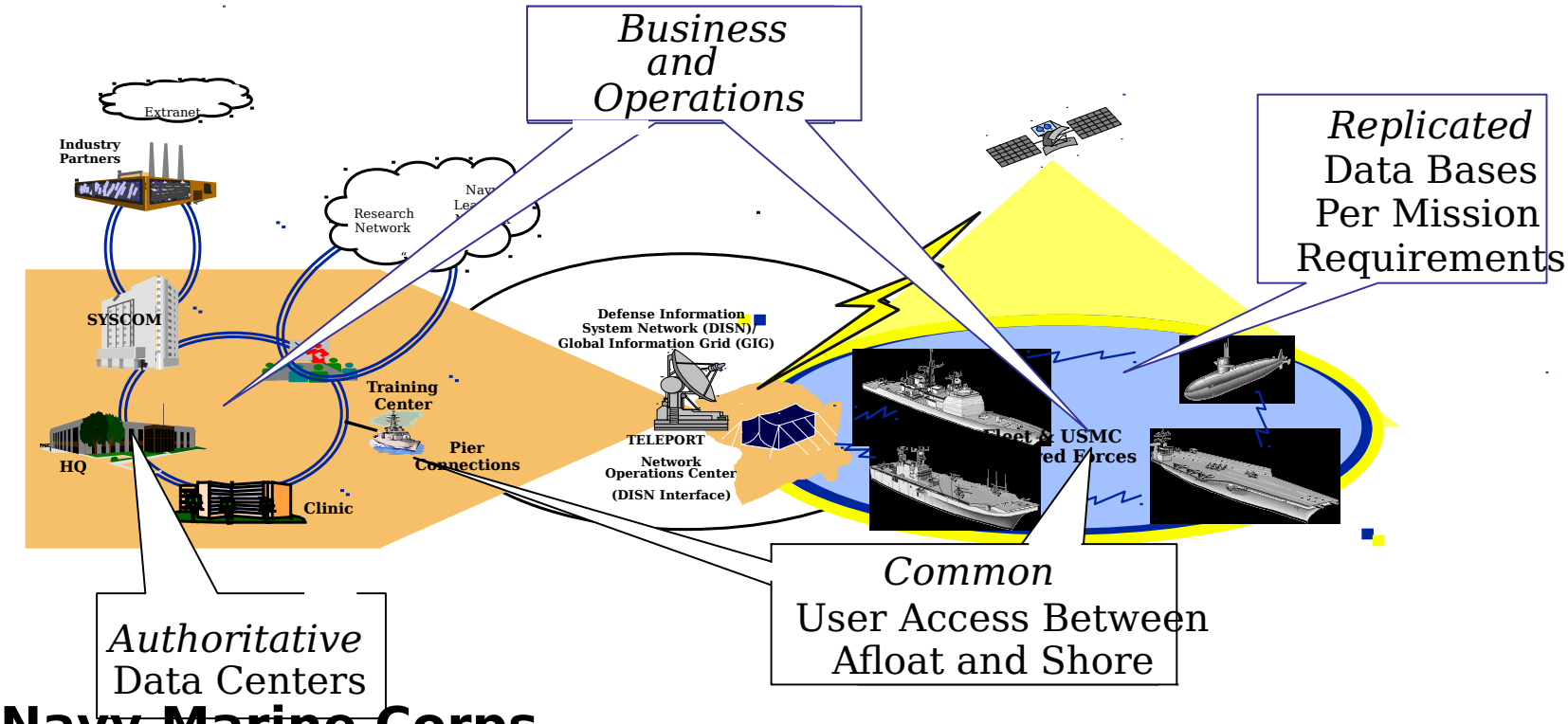


Logistics & Readiness Functional Area Manager (FAM) Perspective

Logistics and Readiness FAM Lead

OPNAV N40

Consolidated Networks
Target Network Architecture



Navy Marine Corps Intranet

IT21 & Marine Corps Enterprise Network

Base Level Information Infrastructure (OCONUS)

PfM Challenge - Sense of Urgency

- **Capital Planning/Investment Mandates Enterprise Architecture**
  - *OMB Circular A130 – 30 Nov 2000*
- **Functional Areas and Functional Data Managers Responsibilities**
  - *SECNAVINST 5000.36 - 1 Nov 2001*
- **Reduce Applications & Databases to Facilitate NMCI Fielding**
  - *CNO Message - 25 Feb 2002*
- **Portfolio Management to Reduce Applications. Need Claimant Support**
  - *N4 memo – 25 April 2002*
- **Authority of Functional Area Managers (FAMs) to Kill Apps**
  - *Under SECNAV Memo - 14 May 2002*
- **CNO Establishes 95% Reduction Goal for Apps within 12 Months**
  - *NAVADMIN 150/02 – 23 May 2002*
- **No new developments without prior FAM approval**
  - *N4 memo – 15 Jan 2003*

Functional and Data Managers
Under Secretary of the Navy designation

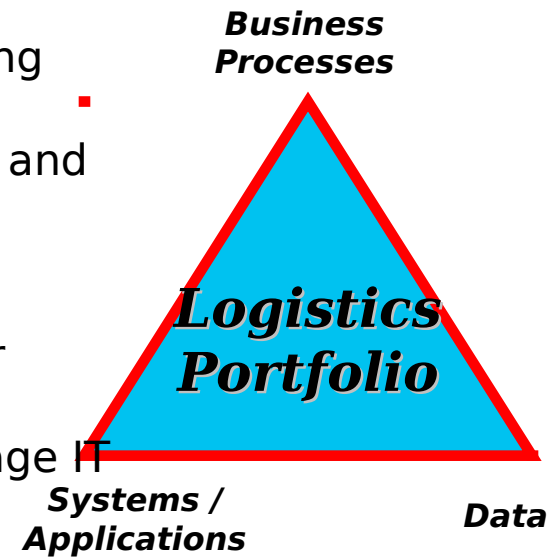
Functional Area	Responsible Organization
Acquisition	ASN (RD&A)
Financial Management	ASN (FM)
Civilian Personnel	ASN (M&RA)
Legal	GC / JAG
Administration	OPNAV DNS
Manpower and Personnel	OPNAV N1
Intelligence and Cryptology	OPNAV N2
Logistics *(includes Facility Management)*	**OPNA**
Readiness	**OPNAV N4**
Command, Control & Communications	OPNAV N6 / N7
Information Warfare	OPNAV N6 / N7
Modeling and Simulation	OPNAV N6 / N7
Weapons Planning and Control	OPNAV N6 / N7
Training and Education	OPNAV N7
Resources, Requirements & Assessment	OPNAV N8
Scientific and Technical	OPNAV N091
Test and Evaluation	OPNAV N091
Medical	OPNAV N093
Reserve Affairs (USMC & USN)	OPNAV N095
Meteorology, Oceanography, MC&G	OPNAV N096
Precise Time and Astrometry	OPNAV N096
Religious Ministries	OPNAV N097
Naval Nuclear Propulsion	OPNAV N00N
* Enterprise Services	OPNAV N6 / N7

FAMs are responsible for IT PfM

Functional and Data Managers
PfM Begins

FAM Responsibilities:

- Alignment of technology and business/warfighting strategies
- Oversee reduction and consolidation of applications and databases
- Direct migration or retirement
- Develop and manage IT portfolio
- Establish common processes



FDM Responsibilities:

- Works for FAM
- Monitor Data Usage
- Database & Metadata Registration
- Develop Functional View of the DON Data Architecture
- Develop Standard Data Elements
- Implementation of Data Standards
- Designate Authoritative Data Sources

- **FAM Expertise:**
- Policy
- Business Processes
- BCA .. Learning

FDM Expertise:

- Policy
- Business Processes
- Data Use & Modeling

Domain Owner to FAM Relationship

Organization is consistent with OSD domains

USD (AT&L) for Logistics

Logistics
Readiness

ASD (NII) DCIO for Technical Infrastructure

Enterprise Services
Administration
C3
Information Warfare
Intelligence & Cryptology
METOC
Precise Time & Astrometry
Weapons Planning & Control

USD (P&R) for Human Resource Management

Civilian Personnel
Manpower & Personnel
Administration
Training & Education
Legal
Reserve Affairs
Medical
Religious Ministries

USD (AT&L) for Acquisition/Procurement

Acquisition
Test & Evaluation
Scientific & Technical
Modeling & Simulation
Naval Nuclear Propulsion

USD (AT&L) for Installation and Environment

Logistics

USD (C)/CFO for Programming, Budgeting & Funds Control

Financial Management
Resource, Requirements, and Assessments

USD (C)/CFO for Finance, Accounting Operations, & Financial Management

Financial Management

* **RED** indicates Primary FAM

The Size of the Problem

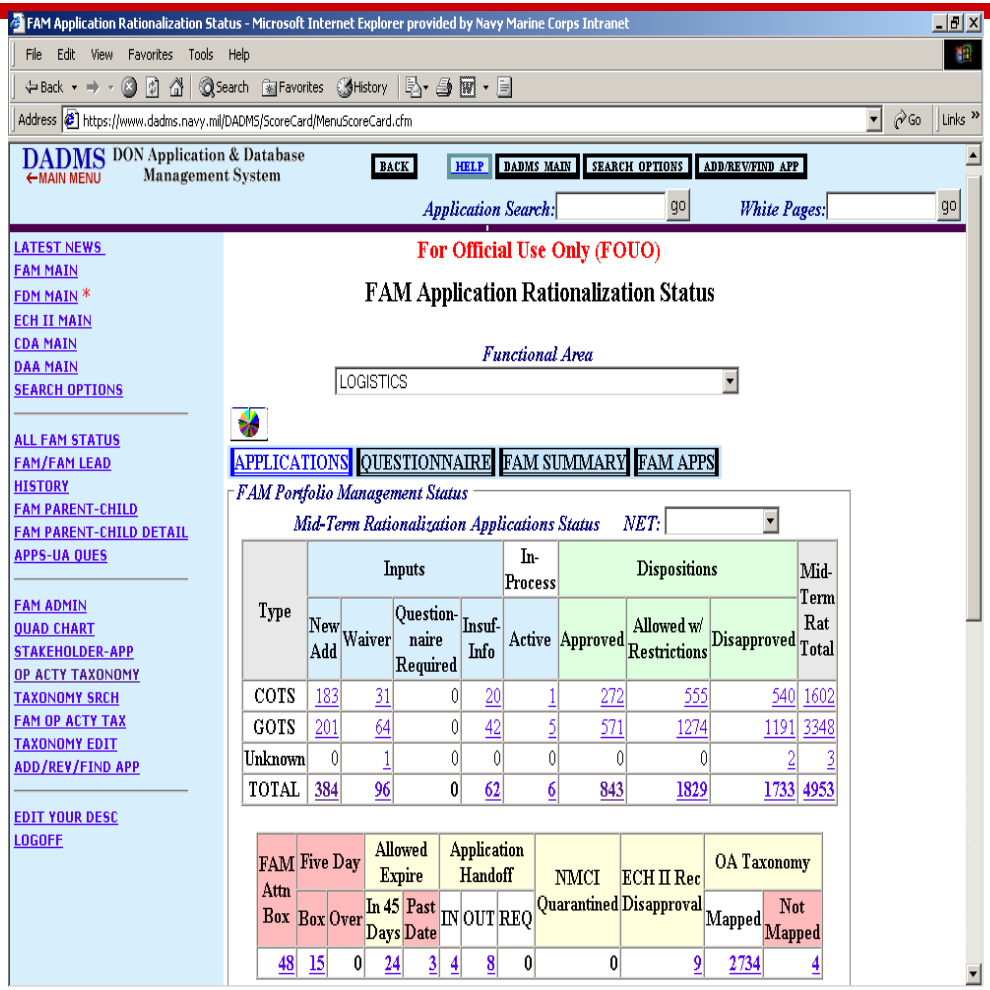
Functional Area	Responsible Organization	Number of Applications
Acquisition	ASN (RD&A)	- 838
Financial Management	ASN (FM)	- 2,069
Civilian Personnel	ASN (M&RA)	- 501
Legal	GC / JAG	- 104
Administration	OPNAV N09B	- 20,484
Manpower and Personnel	OPNAV N1	- 963
Intelligence and Cryptology	OPNAV N2	- 28
Logistics *(includes Facility Management)*	OPNAV N4	- 14,315
Readiness	OPNAV N4	- 576
Command, Control & Communications	OPNAV N6 /	
Scientific and Technical	OPNAV N091	- 2,192
Test and Evaluation	OPNAV N091	- 939
Medical	OPNAV N093	- 281
Reserve Affairs (USMC & USN)	OPNAV N095	- 33
Meteorology, Oceanography, MC&G	OPNAV N096	- 270
Precise Time and Astrometry	OPNAV N096	- 46
Religious Ministries	OPNAV N097	- 33
Naval Nuclear Propulsion	OPNAV N00N	- 77
Enterprise SBE		- 1

LOGISTICS *(includes Facility Management)* OPNAV N4 - 14,315

READINESS OPNAV N4 - 576

Building a PfM Process
Central Repository - DADMS

DON approved IT Portfolio Repository


FAM Application Rationalization Status - Microsoft Internet Explorer provided by Navy Marine Corps Intranet
File Edit View Favorites Tools Help
Address https://www.dadms.navy.mil/DADMS/ScoreCard/MenuScoreCard.cfm
DADMS DON Application & Database Management System
MAIN MENU
BACK HELP DADMS MAIN SEARCH OPTIONS ADD/REV/FIND APP
Application Search: go White Pages: go
LATEST NEWS
FAM MAIN
FDM MAIN *
ECH II MAIN
CDA MAIN
DAA MAIN
SEARCH OPTIONS
ALL FAM STATUS
FAM/FAM LEAD
HISTORY
FAM PARENT-CHILD
FAM PARENT-CHILD DETAIL
APPS-UA QUES
FAM ADMIN
QUAD CHART
STAKEHOLDER-APP
OP ACTY TAXONOMY
TAXONOMY SRCH
FAM OP ACTY TAX
TAXONOMY EDIT
ADD/REV/FIND APP
EDIT YOUR DESC
LOGOFF
For Official Use Only (FOUO)
FAM Application Rationalization Status
Functional Area
LOGISTICS
APPLICATIONS QUESTIONNAIRE FAM SUMMARY FAM APPS
FAM Portfolio Management Status
Mid-Term Rationalization Applications Status NET:
Type | Inputs: New Add, Waiver, Questionnaire Required, Insuf-Info | In-Process: Active | Dispositions: Approved, Allowed w/ Restrictions, Disapproved | Mid-Term Rat Total
COTS 183 31 0 20 1 272 555 540 1602
GOTS 201 64 0 42 5 571 1274 1191 3348
Unknown 0 1 0 0 0 0 0 2 3
TOTAL 384 96 0 62 6 843 1829 1733 4953
FAM Attn Box | Five Day: Box, Over | Allowed Expire: In 45 Days, Past Date | Application Handoff: IN, OUT, REQ | NMCI Quarantined | ECH II Rec Disapproval | OA Taxonomy: Mapped, Not Mapped
48 15 0 24 3 4 8 0 0 9 2734 4

A questionnaire Is completed For each Application

Data Elements include:
-Security
-Users
-POCs
-Networks
-Databases
-FAM status
-Etc.

Department of the Navy Application and Database Management System (DADMS)

Building a PfM Process
Logistics & Readiness Taxonomy

Short & Mid Term Phases

Building a PfM Process
Logistics & Readiness Taxonomy

Every IT Application is Mapped to the taxonomy (& OSD domain)

N4

N40

Coordination with FEA, BEA, BEA-LOG & ERP

N 40 • Acquisition Logistics
-Supportability Analysis
-Maint P…
-Design …s
-Tech Data Analysis
-Supply Support Analysis
-Supp & Test Equip Analysis
-Performance Based Logistics
-Environmental Analysis
-ETC.

SAP ERP

• Technical Data
-Administer Policy & Guidance
-Acquire
-Create & Update
-Store
-Manage & Maintain
-Publish
-Access & Distribute
-Disposal & Archive

N 41 • Supply
-Material Management
-Material Requirements Plng
-Prioritization of Orders
-Item Introduction
-Plan for Sys Sustainment
-Plan…ice Life
- ET…
-Supply Chain Mgmt & Prcmt
-Procurement Data Mgmt
-ETC
-Inventory Mgmt
-Transp & Distribution
-Transportation Planning
-ETC

SAP ERP

• Ordnance Management

N 42 • Strategic Mobility & Combat Logistics

N 43 • Maintenance
-Aviation
-Maintenance Planning
-Work Pkg Dev
-Work Pkg Authoriz
-Work Pkg Funding
-Work Scope Def
-ETC
-Configuration Management
-ETC
-Ship
-Maintenance Planning
-Work Pkg Dev
-Work Pkg Authoriz
-Work Pkg Funding
-Work Scope Def
-ETC
-Configuration Management
-ETC

SAP ERP

Fleet Readiness Reporting

N 45 • Environment
-Environmental Mgmt
-Environmental Restoration
-Hazardous Mat Mgmt
-Air
-Water
-Natural Resources
-Laboratory
-Waste
-Data Sources

• Safety
-FECA/Safety Interface
-Safety References
-Safety Data Management

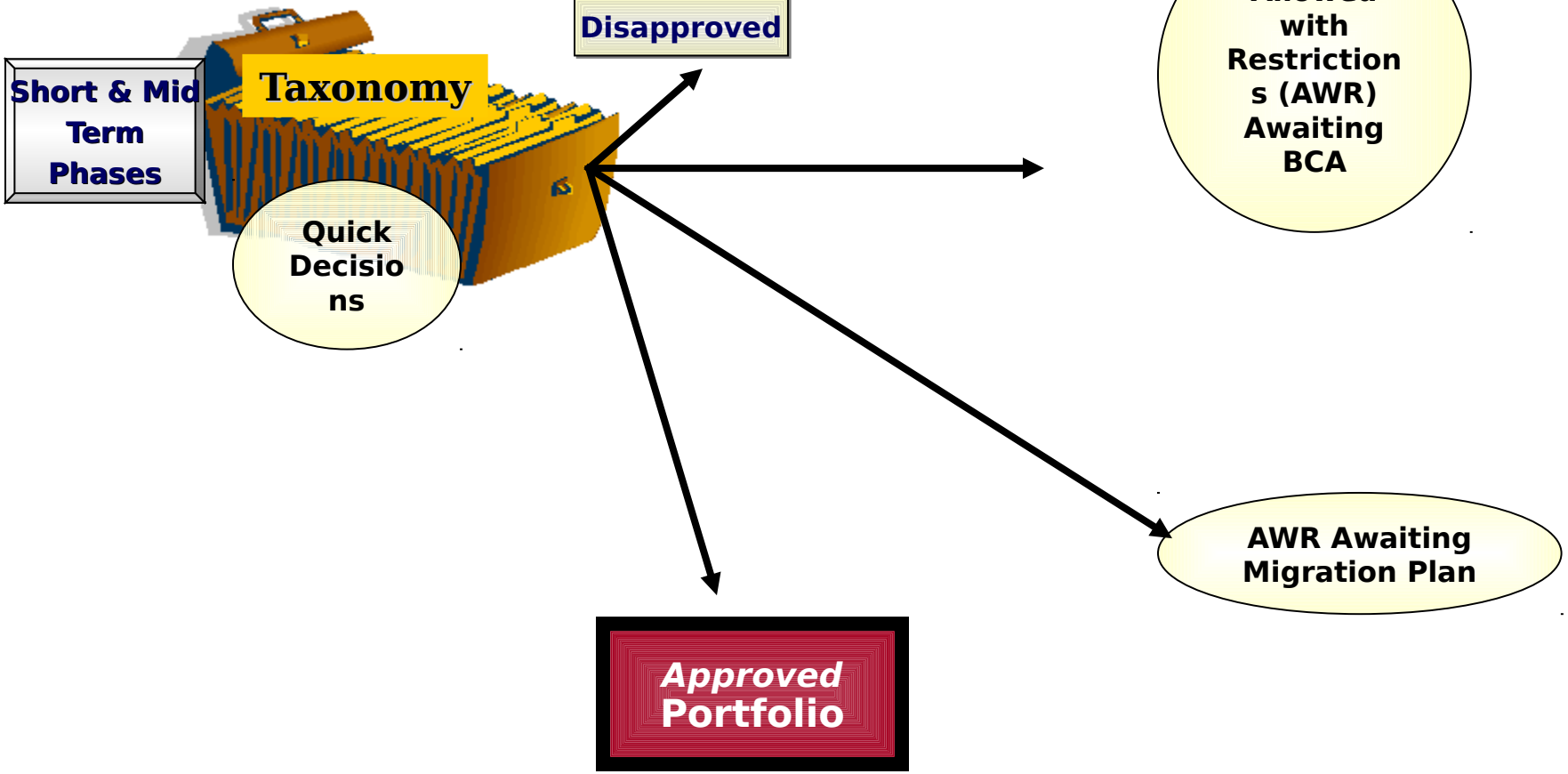
N 46 • Installation / Facilities
-Base Support
-Command and Staff
-Command
-Information Tech Ser…
- MILPERS Services
…ource Manageme…
-Facility Support
- Base Support Vehicl…
- ETC
- Facility Services
-Utilities
- ETC
Community Support
-Housing
-Bachelor Quarte…
-ETC

ABC/M

• Civil Engineering
-Seabee Equipment Mgmt
-Seabee Expeditionary Logis…
-Seabee Operations
-Seabee Program Planning

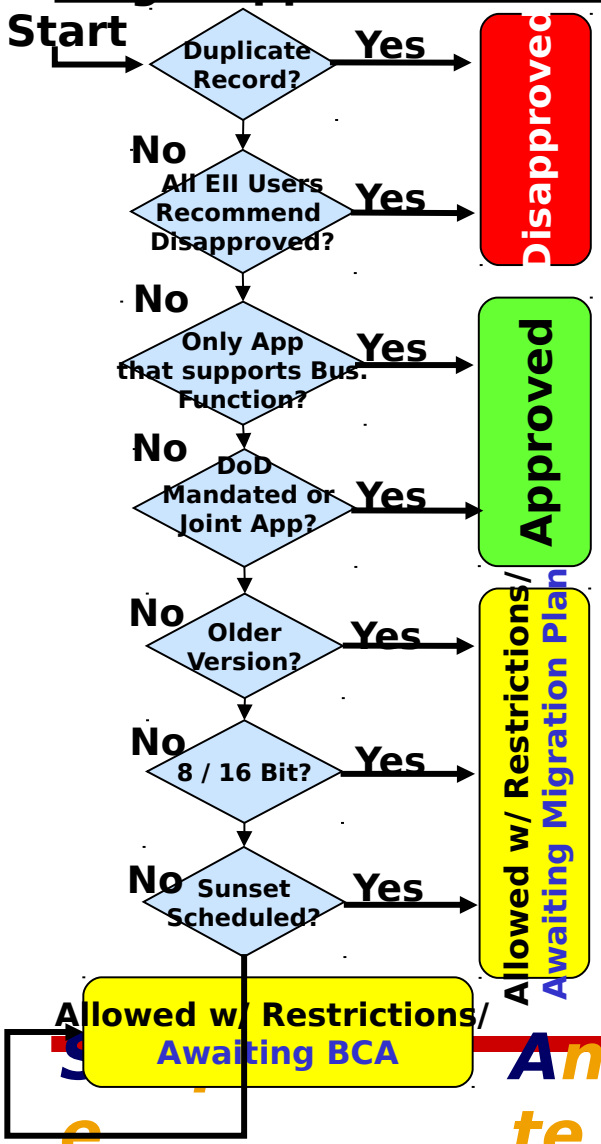
Validated with:
- Various SECNAV / OPNAV instructions
- Universal Joint Task List (CJCSM 3500.04B)
- Fit with reported apps

Building a PfM Process
Quick Decision



Building a PfM Process
Quick Decision Tools

Single Application Filter



Return to Checklist

IT PfM Tool

Quick Decision Cheat Sheet

Overview: This sheet gives both positive (keep) and negative (kill) criteria for an application in the mid-term process. An application that meets most positive criteria should be retained, while an application that meets few positive criteria or many negative criteria is a candidate for disapproval or allow with restrictions.

Quick Decision Criteria

Positive Criteria		
DADMS Questionnaire Question	Criterion	App Meets?
CDA #6-8	TFW 3 Tier architecture, Web-based, XML architecture,	
CDA #9-11	Compatible with late version industry leading OS (Sun Solaris V8, HP UX V11, Windows 2000 or XP)	
CDA #9	Runs from a standard browser	
UIC #7	3rd party provides support	
CDA #14	DITSCAP certified	
CDA #5	Late or only version	
CDA #1	Joint/Federal/DoD app	
CDA #4	No successor system	
Step 4	Navy / USMC / Ech II standard application	
CDA #12	Using standard DMBS (Informix, Oracle, Sybase, SQL Server)	
UIC #3	Part of larger suite of applications	
CDA #2	Mandatory application	
UIC #2, CDA #3	Essential to performing function	
UIC #5, #6	Unique to function	
UIC #4	Large user base (+10,000 users)	

Building a PfM Process
Quick Decision Pilot – Maint SubFAM

Taxonomy Definitio

- Validated definitions from OPNAV instruction
- Further defined sub-levels of taxonomy
- Clarified and refined definitions

Gather Data

- Worked with Echelon IIs to
  - Complete questionnaires
  - Update insufficient information in records
  - Identified and processed low hanging fruit such as older versions requiring upgrades

Quick Decision

- Created Tiger Teams to provide input
  - Approve
  - Allowed w/ Restriction Dates
  - No longer necessary (Disapproved)
- Utilized Quick Decision Cheat Sheet

TOTAL COUNT N43 Aviation Maintenance Portfolio

Approved: 14

Allowed w/ Restrictions: 194

Disapproved 126

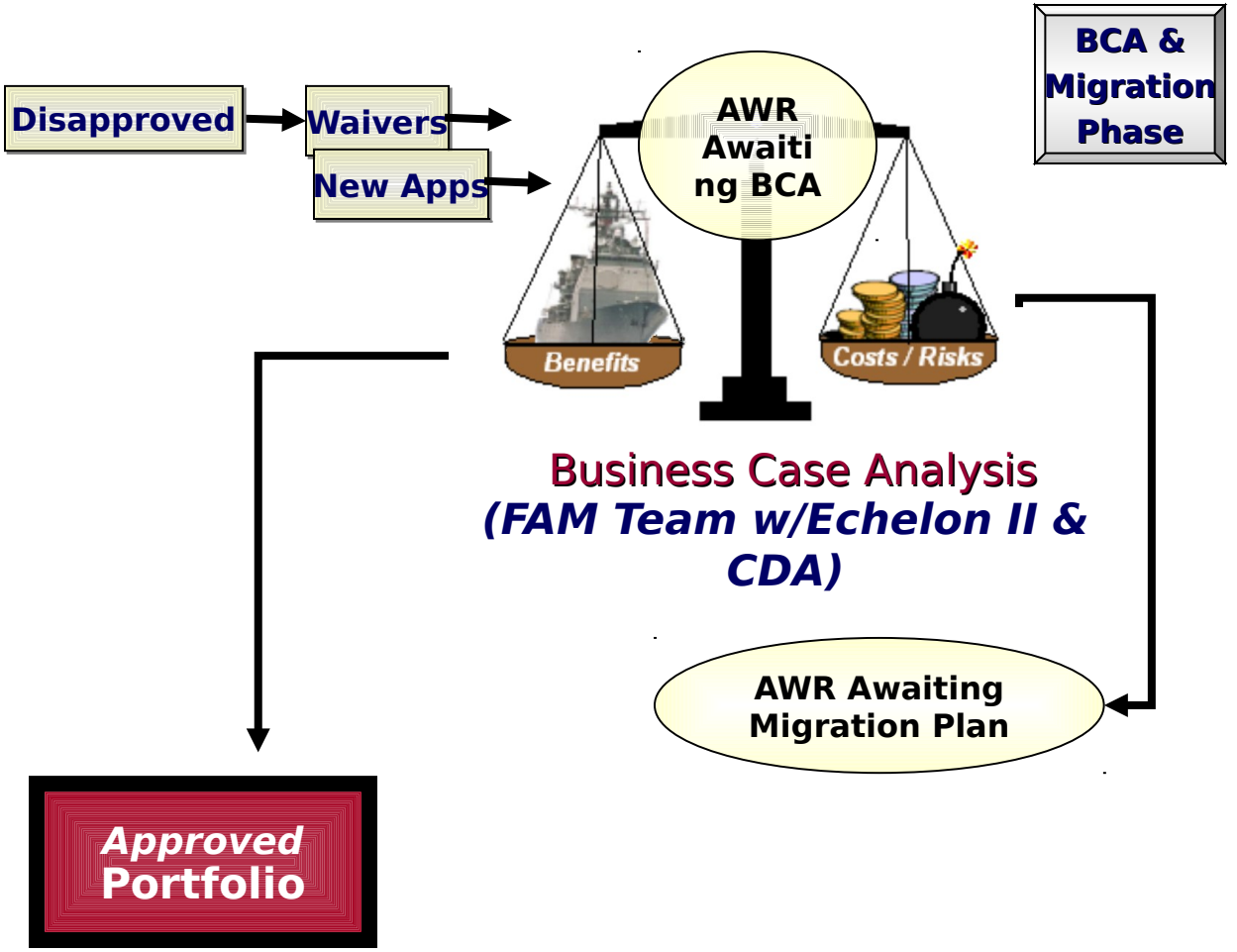
Best Practices

- Bi-Weekly Sub-FAM Meeting
- Engaged Echelon IIs & Tiger Team Early
- Leverage memos/deadlines from high ranking Navy officials

Lessons Learned

- Significant coordination w/ Echelon II is required
- **Initial Data is incomplete and must be validated**
- VCNO/CNO/DNS communications/deadlines created a needed sense of urgency
- Accurate CDA info & participation is

Building a PfM Process
Business Case Analysis (BCA)



Building a PfM Process
BCA Pilot – Inst & Fac SubFAM

Validate/ Gather Data

- Conducted 5 key meetings on each coast (6 – 8 people from around the world + contract support)
- Worked with Echelon IIs and users to validate questionnaire data
- Created and populated cost data spreadsheet

Conduct BCA

- Rationalized 11 applications mapped to taxonomy areas (Utilities)
- Met with IPT to analyze data gathered from CDA and key users
- Documented decisions in DADMS, and drafted BCA document

Migration Planning

- Drafted migration document s based on analysis
- Determined Life Cycle (Utilities) design and implementation costs for next 5 years ($15M)

N46 Installation / Facilities Portfolio (utilities)

Approved: 1

Allowed w/ Restrictions: 7

Disapproved: 3

Best Practices

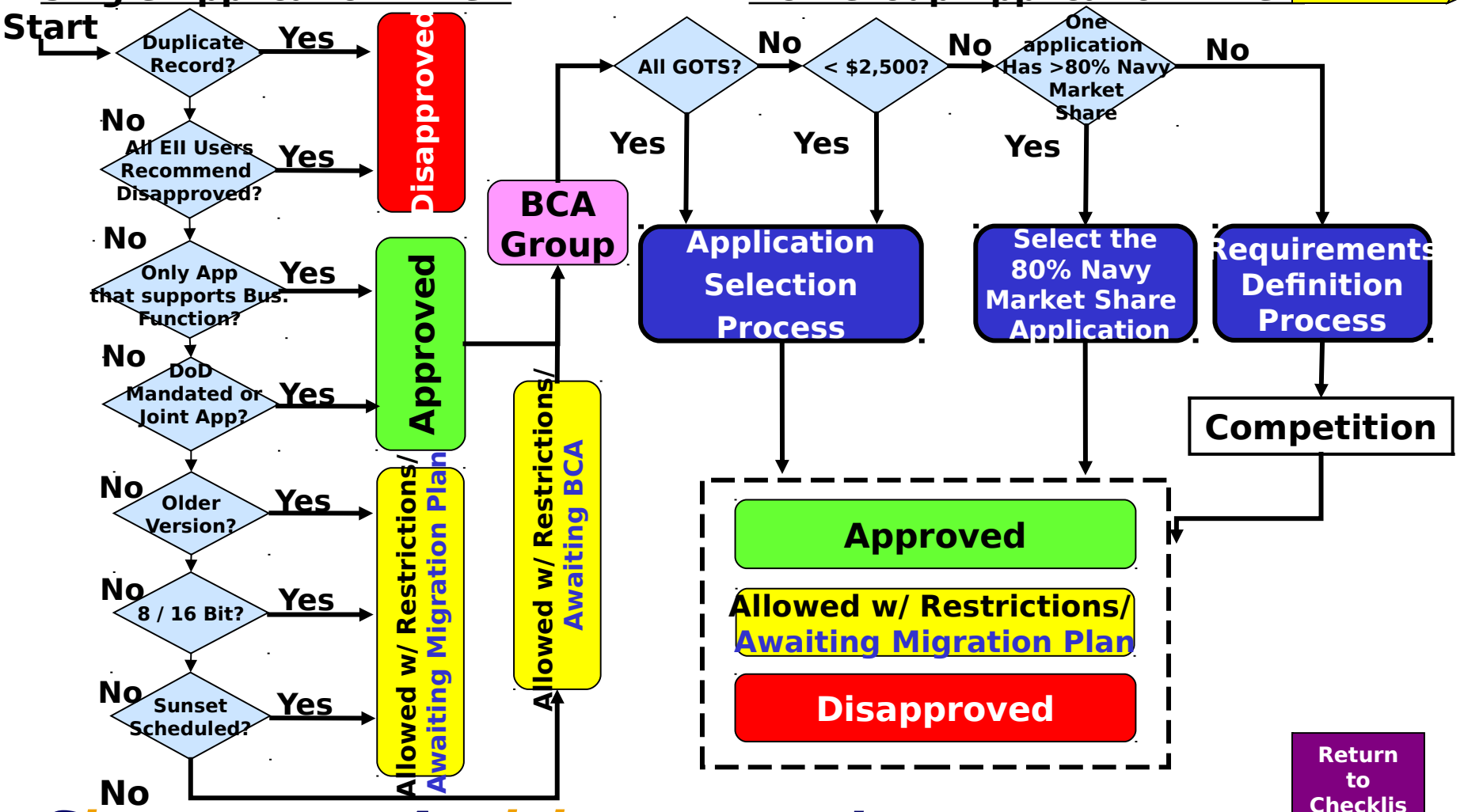
- Created spreadsheet to capture specific cost data
- Engaged Echelon IIs & Tiger Team Early
- Talk to application Subject Matter Experts early

Lessons Learned

- Significant coordination w/ Echelon II is required
- Data must be validated
- **Identifying accurate cost information requires significant effort (resources and time)**

Building a PfM Process
Tools – BCA Filter

IT PfM Tool



Building a PfM Process
Tools – BCA Checklist

Step	BCA Development Planning	Complete	Action	Person Responsible
1	**Determine Initial BCA Group** (CLICK HERE FOR DETAILS)		Find an area of your Operational Activity Taxonomy that requires rationalization. Ideal candidate areas would be those with the most applications, or those areas most likely to include applications with duplicate functionality.	FAM
2			Examine the functional descriptions, business processes, and notes for each of the applications in your candidate area. Determine which applications have functional overlap or duplication. If the applications in the taxonomy area can be divided into more than one functional grouping, further refinement of the taxonomy area is needed.	FAM
3			Select a set of applications (roughly 5-15) with overlapping or duplicate functionality as the initial BCA Group.	FAM
4			Determine where the BCA Group is slated for ERP using the ERP Planning Guide (Global Template 1, Potential Future Template, None Planned).	FAM
5	**Develop POA&M** (CLICK HERE FOR DETAILS)		Develop a detailed POA&M and BCA Deliverables Checklist including key tasks and milestones required to execute the BCA.	FAM
6	**Identify and**		Identify Echelon IIs for each application in the BCA Group.	FAM

IT PfM Tool

Building a PfM Process
Tools - BCA Guidance

IT PfM Tool

Microsoft Excel - 20031217 ERP Planning Guide - November [Read-Only]

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Times New Roman 16

A1 = Functional Area Manager (FAM) BCA

	A	B	C	D
1	**Functional Area Manager (FAM) BCA**			
2	**ERP Planning Guide**			
3	9-Nov-03		Return to Index	Return to Checklist
4				
5	**Code**	**Function Title**	**ERP Global Template**	**Notes**
6	LOG 01.	Conduct Logistics	No ERP Planned	
112	LOG 01.05.01.03.05.02.	Utilities Operations	Future Template	
113	LOG 01.05.01.03.05.03.	Utilities Planning/Analysis	Future Template	
114	LOG 01.05.01.04.	Emergency Preparedness	No ERP Planned	
115	LOG 01.05.01.04.01.	Disaster Preparedness	No ERP Planned	
116	LOG 01.05.01.04.02.	Federal Fire	No ERP Planned	
117	LOG 01.05.01.04.03.	Force Protection	No ERP Planned	
118	LOG 01.05.02.	Community Support	No ERP Planned	
119	LOG 01.05.02.01.	Housing	No ERP Planned	
120	LOG 01.05.02.01.01.	Bachelor Quarters Operations	No ERP Planned	
121	LOG 01.05.02.01.02.	Family Housing	No ERP Planned	
122	LOG 01.05.02.01.03.	Personnel Support	No ERP Planned	
123	LOG 01.05.03.	Operating Forces Support	No ERP Planned	
124	LOG 01.05.03.01.	Air Operations	No ERP Planned	
125	LOG 01.05.03.02.	Operations Support	No ERP Planned	
126	LOG 01.05.03.03.	Port Operations	No ERP Planned	
127	LOG 01.05.04	Installation/Facilities Support Databases	No ERP Planned	
128	LOG 01.06.	Maintenance	ERP Global Template 1	17% of Maintenance apps estimated to migrate to ERP in Global Template 1
129	LOG 01.06.01.	Aviation	ERP Global Template 1	17% of Maintenance apps estimated to migrate to ERP in Global Template 1
130	LOG 01.06.01.01.	Configuration Management	ERP Global Template 1	17% of Maintenance apps estimated to migrate to ERP in Global Template 1
131	LOG 01.06.01.01.01.	Configuration Auditing	ERP Global Template 1	17% of Maintenance apps estimated to migrate to ERP in Global Template 1

Index | Taxonomy Code | ERP Template

Building a PfM Process
Tools - BCA Templates

IT PfM Tool

Microsoft Excel - 20031217 FAM BCA Tools [Read-Only]

File Edit View Insert Format Tools Data Window Help Acrobat

D:\20031217 BCA Deliverables\20031217 FAM BCA Tools.xls

A1 = Functional Area Manager (FAM) BCA

Functional Area Manager (FAM) BCA

Application Functionality Matrix

17-Dec-03

Click Here for Instructions.

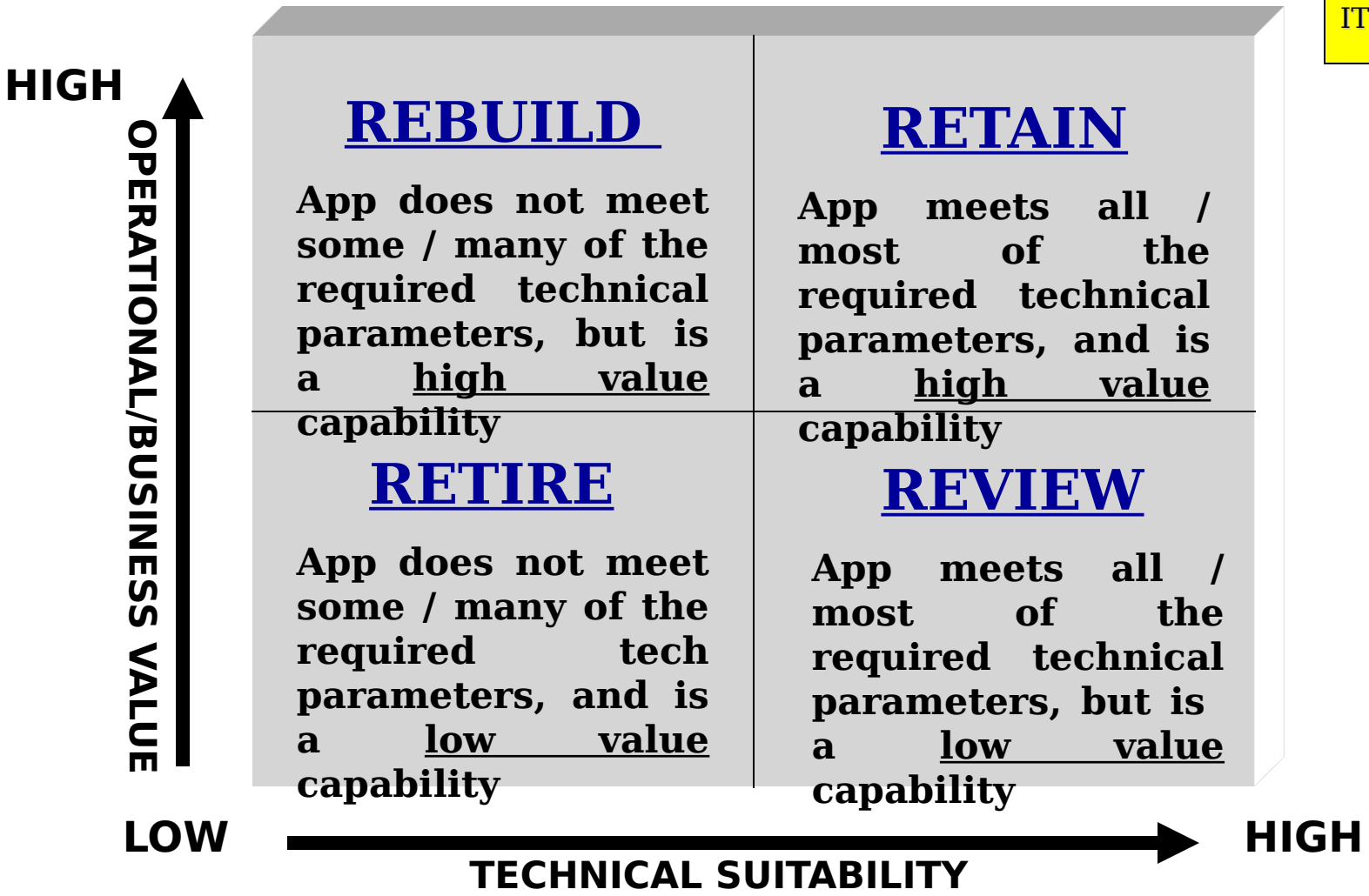
Return to Index | Return to BCA Initiation Checklist | Return to Application Selection Checklist

ANALYSIS AREA: REPORTING TOOLS	Functions (Requirements)												Additional Requirements? (Enter Below)			
	Multiple Types of Sources Supported	Multiple Database types supported	Multi-Format generation (PDF, MS Office)	Web Reports	Easily customized reports (WYSIWG, drag-n-drop)	XML	Thresholding / Alerting	Reusable components	Graphing (multi-format)	Automated (scheduled) reports	Total	Percentage	PDA Reports			
ACTUATE REPORTSERVER/REPORTCAST																No longer sold. Now called Ac
CONTROL-D FOR DISTRIBUTED SYSTEMS	1	1		1	1					1	5	50%				Used by BUPERS Online, all N
CUSTOMER NOTEBOOK	1				1			1			3	30%				GOTS, integrated financial repo
DOCUMENT ANALYZER	1	1			1						3	30%				Used to analyze data from STA
INFOMAKER	1	1			1		1		1		5	50%				Extract environmental data for
MY EUREKA																No longer sold. Now called Cl
ORACLE REPORTS																
ORACLE REPORTS DESIGNER																
ORACLE REPORTS DEVELOPER	1		1	1	1	1	1		1		7	70%	X			These application are particular Tools. We are considering mo
ORACLE REPORTS LAUNCHER APPLICATION																
ORACLE REPORTS SERVER																

Index | POC List | App Functionality Matrix | Business Value Template | Technical Value Temp

Building a PfM Process
BCA Quadrant Analysis

IT PfM Tool


HIGH
OPERATIONAL/BUSINESS VALUE
LOW
REBUILD
App does not meet some / many of the required technical parameters, but is a high value capability
RETAIN
App meets all / most of the required technical parameters, and is a high value capability
RETIRE
App does not meet some / many of the required tech parameters, and is a low value capability
REVIEW
App meets all / most of the required technical parameters, but is a low value capability
LOW
HIGH
TECHNICAL SUITABILITY

PfM Pilots
BCA Pilot - Supply SubFAM

Tool / Process Developm

- Lessons learned from N46 Pilot
- Conducted interviews with stakeholders and received process recommendations
- Conducted industry benchmarking for cost analysis (Gartner Group)
- Coordinated with PEO-IT for initial BCA exhibits
- Leveraged FAM process experience

Pilot Progress

- Significant coordination with Echelon II personnel
- Identified process Subject Matter Experts
- Validated / Updated tools and process
- Developed metrics and tracked Echelon II progress
- **Started with 13 apps, remapped 4 apps, found 3 more apps**

Incorporated Lessons Learned

- Captured Echelon II and FAM feedback
- Immediately incorporated feedback for other BCA pilots (e.g., N43 Ship Maintenance)
- Distributed Lessons Learned to stakeholders

N41 Supply Portfolio (Manage Demand Forecast)

Approved: 2

Allowed w/ Restrictions: 6

Disapproved: 4

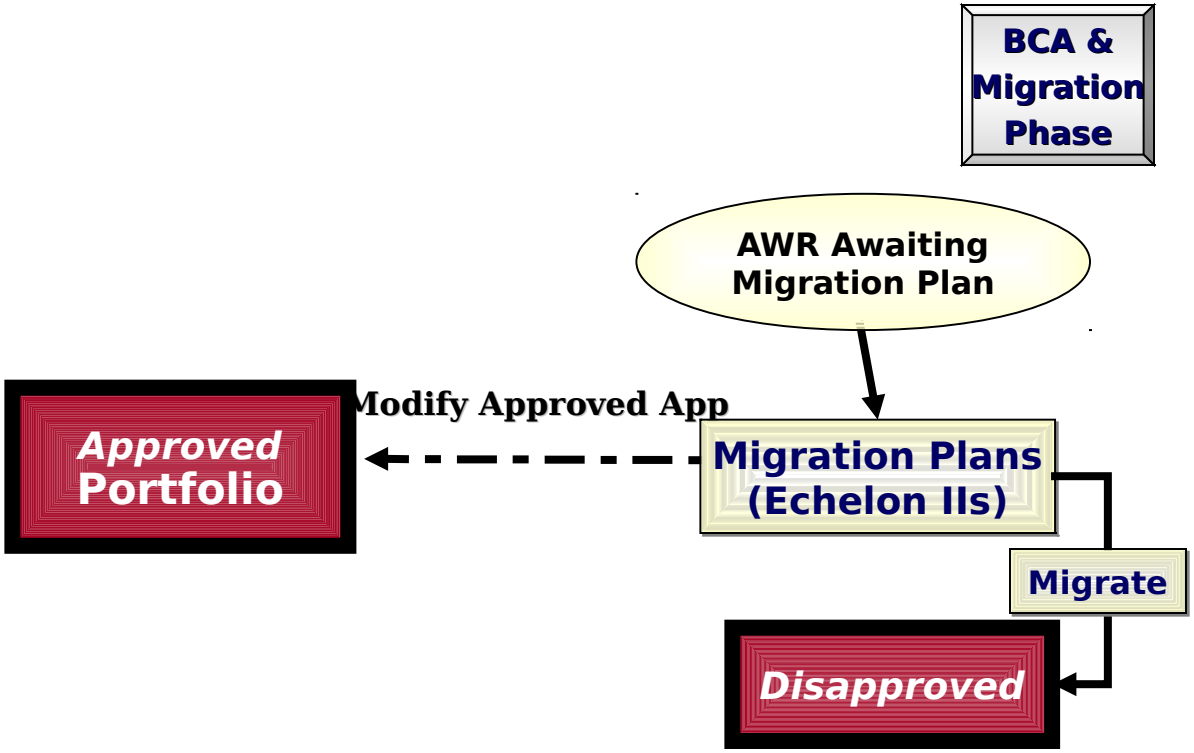
Best Practices

- Track participation and adherence to deadlines
- Involve Subject Matter Experts early
- **Use a checklist step-by-step format**

Lessons Learned

- Initial Kick-off meeting is essential
- **Tracking and reporting metrics improved Echelon II participation**
- Conduct training for participants early in the process
- Need to focus on DADMS questionnaire quality early

Building a PfM Process
Migration Planning



Building a PfM Process
Migration Plan Checklist

IT PfM Tool

Migrating Application Checklist

Overview: The below checklist will serve as a guide for the development of legacy application migration plans ***for an application being migrated to a target "Approved" application***. After the disposition decision has been made, the following steps should be taken to develop a plan for decommissioning the migrating application that has been identified as "Allowed with Restrictions" in DADMS, with the intention of migrating this application to the target "Approved" application.

	Migration Planning	Complete	Action	Person Responsible
1	**Identify Application Migration Manager (AMM)**		Identify the individual responsible for developing the migration planning documentation **(Application Migration Manager (AMM))**.	Echelon II/FAM
2	**Assemble Migration Team** (CLICK HERE FOR DETAILS) (CLICK HERE FOR EXAMPLE)		Identify ALL of the stakeholders (broadly defined as groups that provide input to an application, use an application, receive output from an application, Resource Sponsor, Echelon II, FAM, and Vendors or CDAs for all applications involved in the migration).	AMM
3			Prepare a stakeholder POC list.	AMM
4			Identify the roles and responsibilities of all stakeholders.	AMM
5			Identify Tiger Team members for migration effort (CDA for migrating app, CDA for approved target app, power users, etc.).	AMM
6	**Develop Communication Strategy**		Develop migration communication plan (recipients, channels, frequency, content).	AMM

Building a PfM Process
Migration Planning Pilot

NAVFAC - COMPASS to IEFACMAN

Tool / Process Developm

- Conducted interviews with stakeholders and received process recommendations
- Conducted industry and government best practice research (DLA, PMI, Gartner)
- Leveraged FAM process experience

Pilot Progress

- Coordinated with key stakeholders
- Used tool and process to document Migration Plan
- Validated / Updated tools and process
- Migration scheduled for November 2003

Incorporated Lessons Learned

- Captured Echelon II feedback
- Immediately incorporated feedback into Migration Planning tools and process
- Distributed updated tools and process to Logistics community Navy wide

Best Practices

- Use a checklist step-by-step format
- Leverage example to create documentation
- Use Quickplace to disseminate tool and process information

Lessons Learned

- Conduct training for participants early in the process
- Use cost/savings analysis to justify funding
- **Each Migration Plan requires an Application Migration Manager**

Building a PfM Process
Migration Planning Pilot

NAVAIR - COMTRAK to CMIS

Tool / Process Developm

- Conducted interviews with stakeholders and received process recommendations
- Conducted industry and government best practice research (DLA, PMI, Gartner)
- Leveraged FAM process experience

Pilot Progress

- Coordinated with key stakeholders
- Used tool and process to document Migration Plan
- Validated / Updated tools and process
- Migration Plan is pending funding

Incorporated Lessons Learned

- Captured Echelon II feedback
- Immediately incorporated feedback into Migration Planning tools and process
- Distributed updated tools and process to Logistics community Navy wide

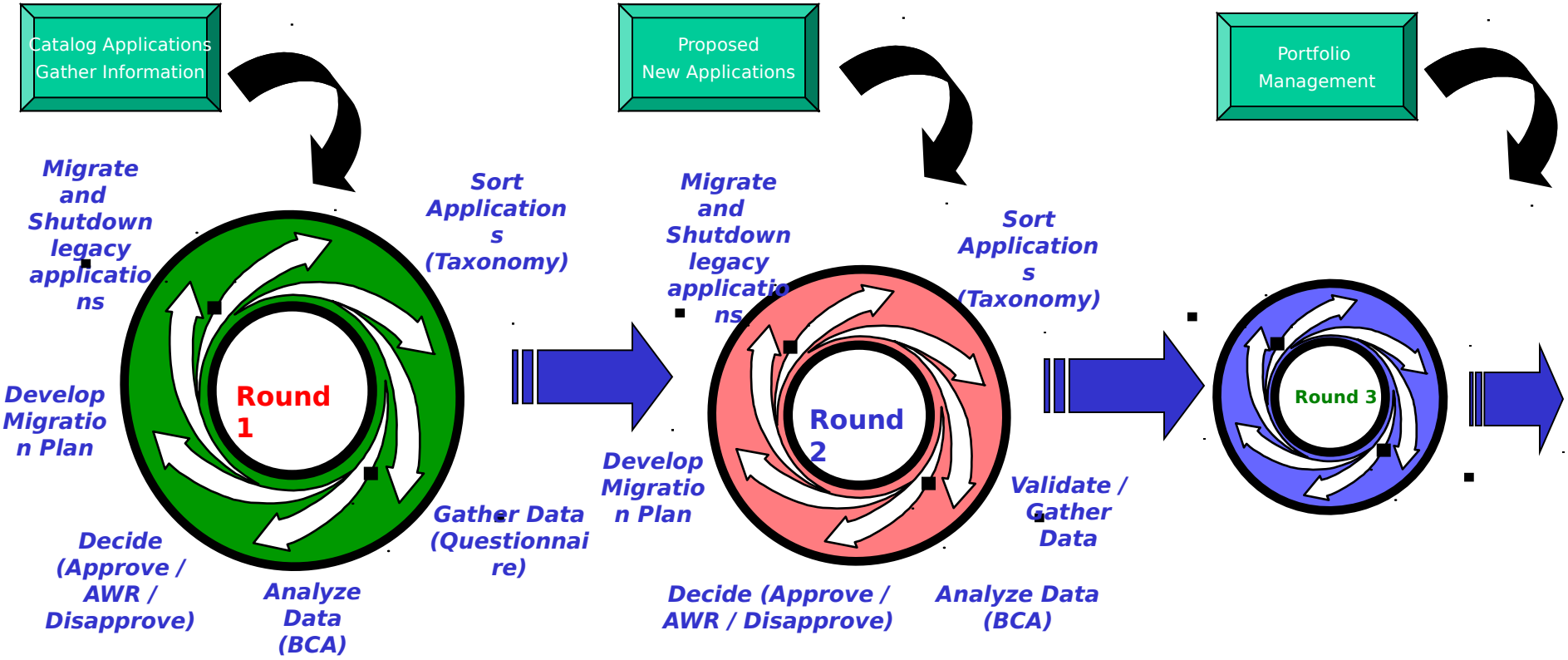
Best Practices

- Use a checklist step-by-step format
- Leverage example to create documentation
- Use Quickplace to disseminate tool and process information

Lessons Learned

- Conduct training for participants early in the process
- Each Migration Plan requires an Application Migration Manager
- **Each migrating application requires a separate Migration Plan (as opposed to one plan for multiple apps)**

Building a PfM Process
Steps Will Continue

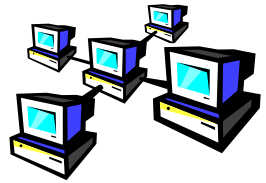


horter cycle time due to **Fewer Applications** and **Process Experienc**

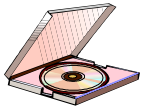
Building a PfM Process
Policy & Guidance

- Logistics & Readiness Functional Area Manager Navy Portfolio Management Plan V2.0 issued 19 August 2003
  - Plan
  - Taxonomy Mapping
  - BCA Guidance
  - ERP Guidance
  - POC Lists
  - Baseline Portfolio Instructions
  - Memorandums
  - Process
  - Scoring

PfM Policies, Regulations, & Guidance



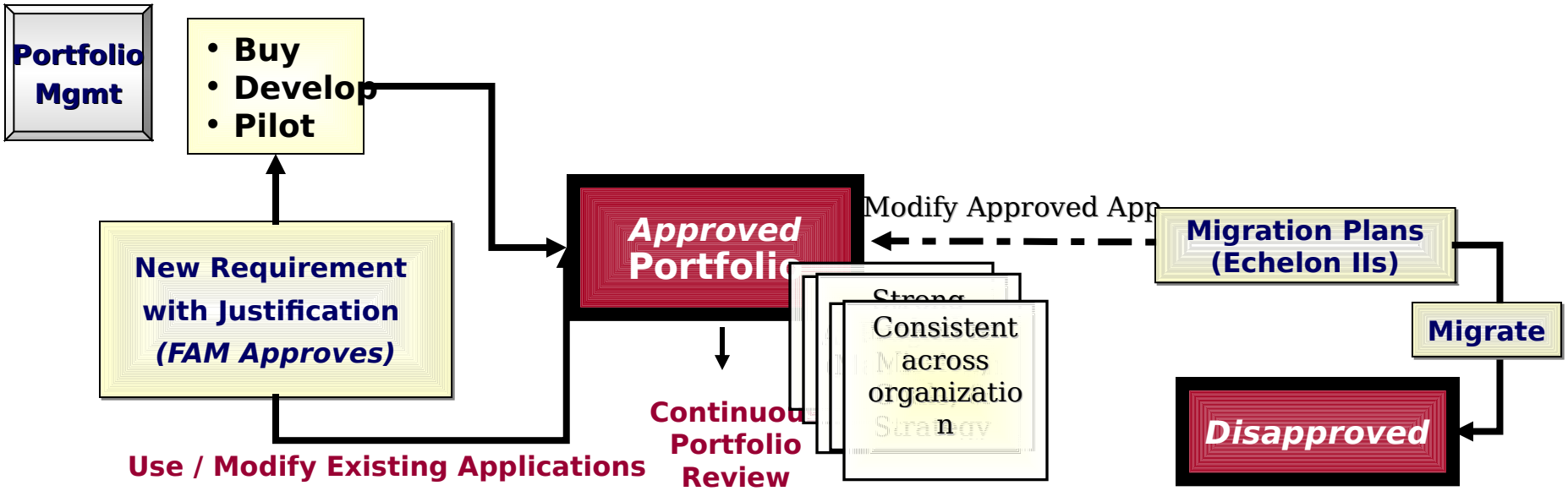
Quickplace



CD-ROM

Hardcopy

Building a PfM Process
A more mature process

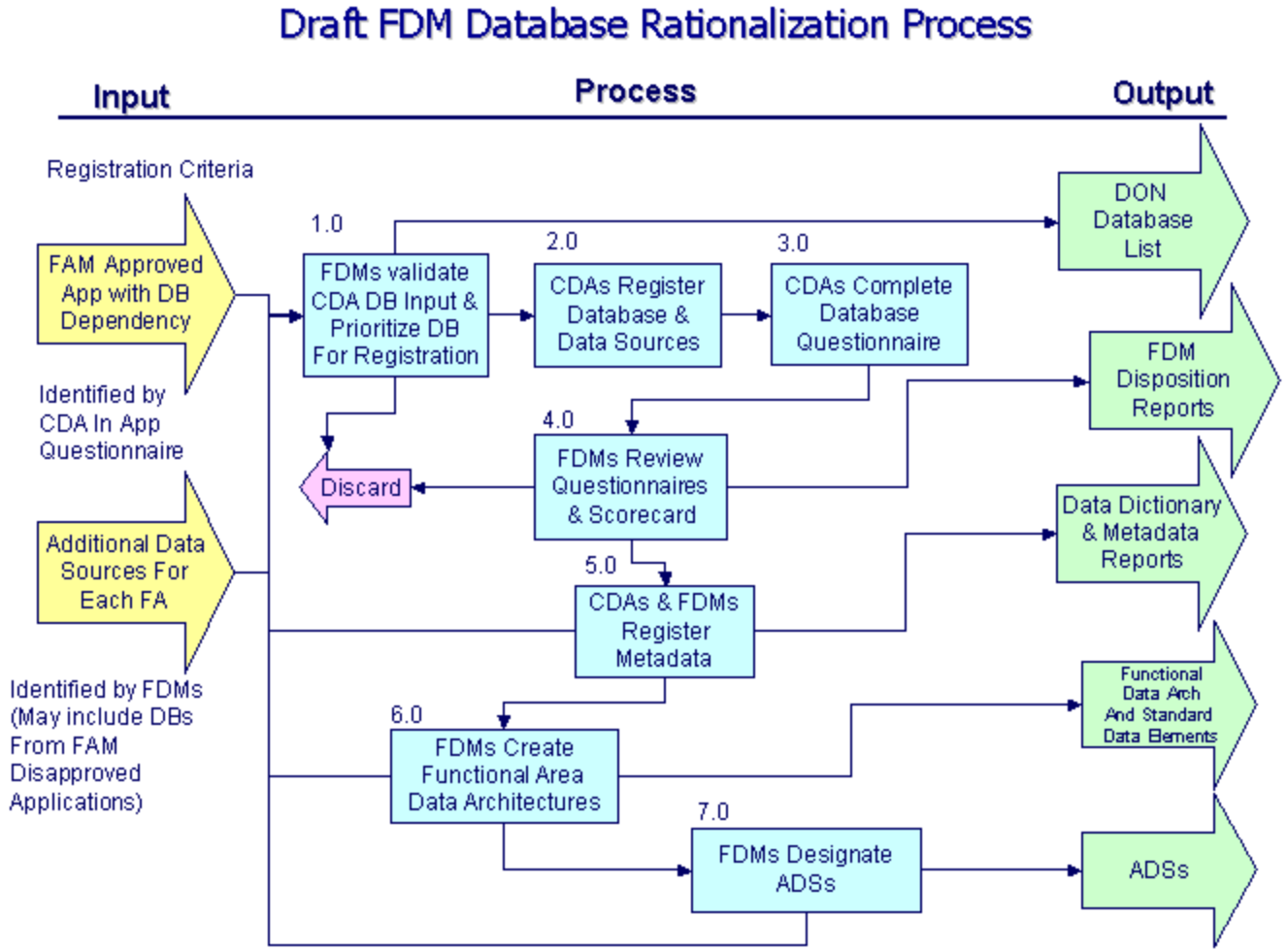


Functional and Data Managers
Oversight & Coordination

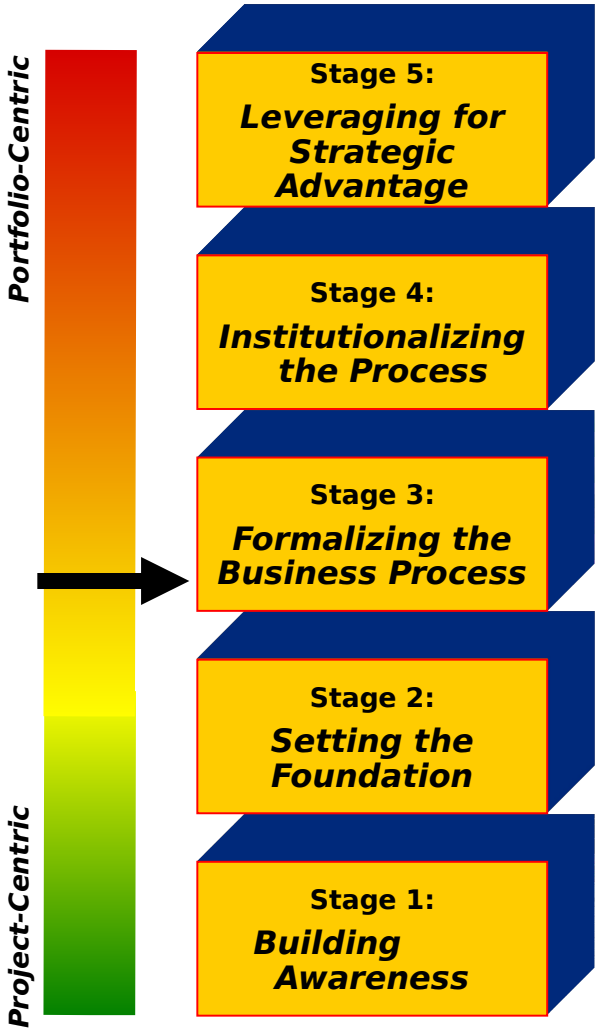
DON Senior Leaders Are Responsible For IT PfM Oversight

- FAM Council chaired by Director of Navy Staff and the Department of Navy CIO - monthly (Flag/SES)
- FAM Executive Panel - bi-weeekly (Flag/SES)
- FAM Lead Working Group (0-6/GS-15)
- Department of Navy Application and Database Management System (DADMS) CCB – Bi-weekly
- Logistics & Readiness SubFAM meetings - Bi-Weekly
  - Process updates
  - DADMS & Tools Training Sessions
  - SubFAM Best Practices
  - Guidance for Next 2 Weeks
- Logistics & Readiness Echelon II POC meetings – Quarterly
- FDM Working Group – Bi-weekly
- Quickplace collaborative website

Functional Data Management
Planning & Pilot Stage



Navy PfM Maturity
Early to Mid Stages



INDICATORS

- Investment management and change management techniques are deployed across the organization
- Focus on strategically shaping business outcomes
- Process evaluation techniques
- Focus on improving the performance and management of the organization's investment portfolio
- Comprehensive portfolio selection and control
- Incorporate benefit and risk criteria
- Linked to mission goals and strategy
- Repeatable investment/project control techniques
- Key foundation capabilities implemented
- Little consistency across organizational boundaries Little awareness of Portfolio Management techniques
- Ad hoc, project-centric processes
- Widely variable outcomes

Barriers to success …

- Business Case Analysis
  - ✓ Getting application information
  - – Workload intense
  - – Comparing apples to apples
    - Applications do many things
    - Applications interface with other applications
- Migration
  - – Application ‘love-affairs’
  - – GOTS tied to processes .. Not designed for re-use .. Not modular
  - – Moving funds to approved applications
- Data Management
  - – Too many apps to be feasible today
  - – Path not well defined yet

Questions

N402A